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MUSIC USA 88

The American Music Conference's 1988 Statistical Review of the U.S. Music Industry with Highlights of Studies into Young Adults' Attitudes Toward Music-Making and Consumers of Music Software and Home Recording Equipment

THE AMERICAN MUSIC CONFERENCE

What is AMC?

The American Music Conference, a national nonprofit educational association, was founded in 1947 to encourage active amateur music-making and music education for people of all ages. Members include major musical instrument manufacturers, retailers, wholesalers, music industry and music education associations, educational institutions, individuals, and others.

AMC's ten-fold mission is to:

- Educate the general public about the benefits of music in education, recreation and cultural activities.
- Encourage the support, continuation and improvement of the standards of music education in schools.
- Increase appreciation of the value of music in the home, as an avocation and as a character building activity for youngsters.
- Encourage adult instrumental and choral participation.
- Further interest in and attendance at professional entertainment and cultural performances.
- Promote the use of music in industry and therapy.
- Advise and counsel governmental agencies that may engage in the support of community and other musical activities.
- Give recognition to personal effort, distinguished service and leadership in developing musical activities.
- Acquire and disseminate information, undertake studies and surveys, produce publications and publicity, sponsor competitions.
- Cooperate with and support other organizations in the development and advancement of music and musical activities.

What Does AMC Do?

As the public relations and research arm of the entire U.S. music industry, AMC's ongoing programs in support of its mission include:

Consumer Publicity

Publicizing the benefits of music-making and music education with a variety of messages that reach millions of Americans each year through stories carried by national wire services and newspapers, television and radio broadcasts, cable television programs, consumer magazines, industry and music educator trade publications and other print media.

Statistical Reporting

Collecting and disseminating statistical information through MUSIC USA, the music industry's only ongoing annual review of domestic and foreign manufacturers' shipments (at retail value) of traditional and electronic instruments, printed music and accessories.

Consumer Research

Conducting national consumer research into Americans attitudes toward music-making and music education and trends in musical instrument usage.

Music Family Award

Encouraging and recognizing family togetherness and music-making in the home and community with the annual AMC "Amateur Music Family of the Year" award.

Information Source

Serving as the source which governmental agencies, educators, news media, financial analysts, advertising agencies and the public rely on for information about music-making and the music industry.

Who Does AMC Represent?

AMC represents all members of the music industry and music educator communities in the U.S.; it does not promote individual companies, products or people within the industry.

Who Supports AMC?

AMC is supported by the contributions of its members which include instrument and accessory manufacturers, retailers, wholesalers, distributors, publishers, suppliers, trade magazines, and other industry and music educator associations. Contributions are also accepted from music educators, musicians and other individuals who wish to help support the association's programs.

AMC Member Services

In addition to helping AMC spread positive, encouraging messages about music-making and education to America's general public, your contribution entitles you to:

- Six newsletters a year informing you about AMC's publicity results, award programs, research activities and other special projects.
- MUSIC USA, our annual statistical review which reports on manufacturer shipments at retail value in 14 different categories of instruments, printed music and accessories.
- Full written reports on new AMC-sponsored consumer attitude and usage research surveys available at special member rates.

How to Become an AMC Member

For a very small investment in AMC, you will be helping support a wide range of activities which will return that investment many times over.

For more information about AMC membership and recommended contributions, please contact Paul Bjorneberg, Director of Administrative Services, American Music Conference, 303 E. Wacker Drive, Suite 1214, Chicago, IL 60601, or call (312) 856-8820.

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FROM THE PRESIDENT

The American Music Conference's overall mission is to encourage active amateur music-making by people of all ages and promote the support of individual music teachers and school music education programs. This mission is accomplished through two major areas of focus:

- Ongoing publicity programs which underline the importance of music-making experiences for children, adults, senior citizens and families
- And, research projects reported in our annual editions of *Music USA*.

This year, AMC has expanded *Music USA*'s scope with the generous support of the National Association of Music Merchants (NAMM). NAMM's special funding underwrote not only the collection of statistical data and production of this publication, but the addition of a music-industry organization directory and three important new research studies.

For 25 years, *Music USA* has been the music industry's only annual review reporting information about manufacturers' shipments of traditional and electronic instruments, sheet music and accessories. Those familiar with the publication will see that a fifteenth category—music software—has been added this year to track the entry into the music market of this quickly growing product segment.

In addition, this year's book includes results of important new attitude and consumer profile research. This type of research, when conducted on a regular basis, provides the entire music community with data vital for understanding the changing needs of current and future music-makers. The three new AMC studies focus on:

- Young Adults' Attitudes Toward Music-Making—Their use of electronic and traditional instruments and the benefits (or barriers) they perceive about playing musical instruments.
- Music Software and Home Recording Equipment Consumer Profiles—What these consumers need and want from the stores they patronize and the products they utilize in electronic music-making.

Our expanded *Music USA* also contains a central information source about other music trade and educator associations, foundations and college and fraternal music groups. This addition, we hope, will help increase the exposure for these groups and their activities which support and encourage music-making and music education in this country.

On behalf of the American Music Conference, I would again like to thank the National Association of Music Merchants for its support of this publication, the music retailers across the country who participated in the music software and home recording equipment consumer profiles, and the many, many other music community members who gave so willingly of their time and talents to make this expanded edition possible.

Karl Bruhn

HOW TO READ THE DATA

All units and dollars in this annual review are based on shipments by manufacturers at estimated retail value. Imports, and in some cases exports, are included where noted.

To provide an indicator of actual sales at the music retailer level, this review also includes the results of the National Association of Music Merchants' (NAMM) ongoing survey of music stores around the country.

The total 1987 sales figure of $3.677 billion represents in large part manufacturers' shipments sold through music stores. However, in the past several years, the numbers of different outlets selling musical instruments have increased, particularly with the popularity of electronics. Therefore, in categories where it is appropriate, dollar figures also include estimated sales through mass merchandisers, major audio chains, direct mail companies, department stores, and direct to consumers by manufacturers, publishers or distributors.

It should be noted that retail dollar estimates in this report are based on shipments to retailers which may or may not have been sold to consumers each year. The sources of these figures vary widely depending on the availability of a reporting mechanism, the nature of the mix of U.S. made instruments and imports, and whether the category consists of mostly imported instruments that may or may not be correctly classified by the U.S Customs Department. In all cases these statistics reflect U.S. Tariff Commission figures as they appear on the import page of this report.

Only one category in this review is based on an organized but voluntary reporting system, and even within this category (pianos) estimates have been made for manufacturers who do not report their shipments. Government reporting categories for all imported electronic keyboards are unclear, and therefore, determining the exact number of units that properly belong in the organ category, as opposed to portable and other electronic keyboards, continues to be a particular challenge.

In the category of printed music, figures are based on best estimates of experts in this segment of the industry using as a baseline a 1987 survey by the National Music Publishers Association. (It should also be noted that the 1986 figure for printed music has been revised to reflect results of the NMPA survey which were not available at last year's press time.)

Wind instruments, percussion and string data have been analyzed by industry experts who have tracked both domestic manufacture and imports.

In categories where there are no applicable import schedules and no reporting system, a representative number of manufacturers have been interviewed to arrive at a consensus on the size of the market.

This review omits several manufacturing areas for which it is extremely difficult to compile any data, including kits for assembly of instruments, harps, a variety of inexpensive instruments used in elementary education, musical toys, and estimates for craft production other than for bowed string instruments. There is also a brisk market for used or rental instruments which AMC does not follow.

Imports/Exports

Imports are figured into all relevant categories; exports are included only where indicated.

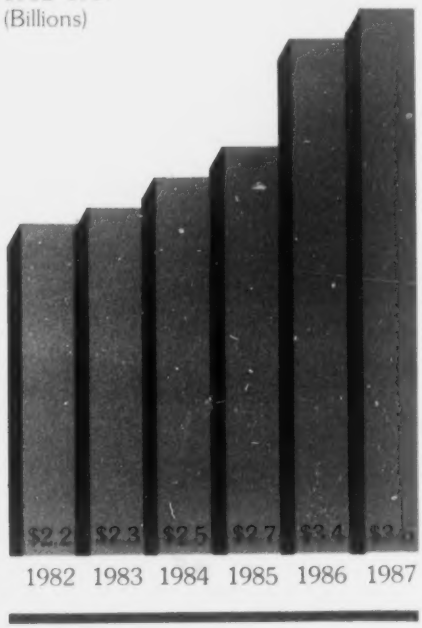
Determining the exact number of units made and sold domestically is becoming more complex each year due to the changing nature of imports. For example, some foreign manufacturers are shipping parts from abroad and assembling in the United States, some have built plants here. Government reporting categories, amplified in 1983, still are inadequate to provide a clear view of exactly what types of electronic instruments are being shipped to the U.S.

The data that appears in this statistical review represents three months of intensive discussions and work with a great many music industry experts. I would like to thank all of those men and women for their help, the insights they provided, and the time they have devoted to helping compile this information.

Paul Bjorneberg
Editor

1987 RETAIL VALUE OF NEW MUSICAL INSTRUMENTS, SHEET MUSIC AND MUSICAL ACCESSORIES UP 10 PERCENT TO $3.6 BILLION

MUSIC INDUSTRY RETAIL DOLLARS
1982-1987
(Billions)



	Music Industry Retail Value	Personal Consumption	% of Personal Consumption[3]	Gross National Product	Cost Living Index
		(Billions)		(Billions)	1967=100
1987	$3,677,747,000[6]	$2,967.0	0.124%	$4,487.7	340.4
1986	3,344,957,000[5]	2,762.5	0.121%	4,206.1	328.4
1985	2,697,900,000	2,582.1	0.104%	3,989.1	322.2
1984	2,496,333,000	2,342.3	0.107%	3,661.3	311.1
1983	2,346,247,000	2,157.0	0.109%	3,310.8	298.4
1982	2,207,745,000	1,971.1	0.112%	3,059.3	289.1
1981	2,375,610,000[4]	1,857.8	0.128%	2,924.8	272.4
1980	2,180,800,000	1,672.8	0.130%	2,626.1	246.8
1979	2,353,609,000	1,509.8	0.156%	2,368.8	217.4
1978	2,299,690,000	1,340.1	0.172%	2,107.6	195.4
1977	2,090,204,000	1,260.2	0.166%	1,963.7	181.5
1976	1,919,010,000	1,079.7	0.178%	1,691.6	170.5
1975	1,741,977,000	963.8	0.180%	1,498.9	161.2
1974	1,821,353,000	877.0	0.207%	1,396.7	147.7
1973	1,524,427,000[1]	804.0	0.189%	1,289.1	133.1
1972	1,306,179,000[2]	721.0	0.181%	1,151.8	125.3
1971	1,106,339,000	662.1	0.167%	1,046.8	121.3
1970	1,005,239,000	616.7	0.163%	976.5	116.3
1969	957,020,000	577.5	0.167%	931.4	109.8
1968	954,138,000	536.6	0.177%	865.7	104.2
1967	924,000,000	491.7	0.187%	785.0	100.0
1966	955,000,000	469.9	0.205%	739.6	97.2
1965	887,000,000	428.7	0.206%	676.3	94.5
1964	731,000,000	398.9	0.183%	628.7	92.9
1963	661,000,000	373.8	0.177%	589.2	91.7
1962	608,000,000	355.1	0.170%	500.3	90.6
1961	538,000,000	335.1	0.160%	520.1	89.6
1960	500,000,000	325.2	0.154%	503.8	88.7
1959	490,000,000	311.2	0.157%	483.7	87.3
1958	441,000,000	290.1	0.152%	447.3	86.6
1957	438,000,000	281.4	0.156%	441.1	84.3
1955	380,000,000	254.4	0.150%	398.0	80.2
1950	235,000,000	191.0	0.124%	284.8	72.1
1949	220,000,000	176.8	0.124%	256.5	71.4
1941	90,000,000	80.6	0.111%	124.5	44.1

1. *For comparable figure in 1972, add $8,000,000 for non-reporting piano manufacturers previously not recorded, and $21,881,000 for higher sheet music sales. Includes a new category - synthesizers.*
2. *Includes a new category – electric pianos.*
3. *To be read as a fraction of 1%.*
4. *Includes a new category – portable keyboards – plus revised estimates for several categories.*
5. *Figure adjusted to reflect final printed music data from survey results not available at 1986 press time.*
6. *Includes new category – music software.*

Note: Government statistics on gross national product, personal consumption are revised annually. The figures noted on this chart are those available in May of every year when Music U.S.A. is compiled.

STATISTICAL INFORMATION

Pianos

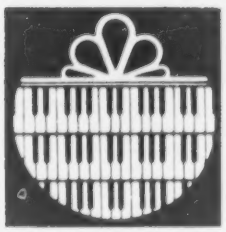
Includes: Domestic production, imports and exports. Player pianos are also included. Electric pianos are categorized separately.

Shipments of pianos rose for the third consecutive year, posting a 5 percent increase in units during 1987 and a 10 percent rise in total dollars. According to industry sources, grands continued to be popular and accounted for nearly half of all dollars in this category. Total dollars for all grands rose 13 percent compared to 1986.

Pianos

	Units	Dollars[1]
1987	174,993	$682,725
1986	166,555	619,763
1985	151,300	480,690
1984	180,000	526,100
1983	197,000	454,345
1982	203,000	421,682
1981	231,000	458,304
1980	233,000	424,060
1979	275,600	452,000
1978	282,172	411,971
1977	258,918	345,914
1976	246,235	303,608
1975	217,329	260,795
1974	248,405	273,246
1973	247,701	239,179
1972	232,507	208,924
1970	193,814	164,000
1965	245,600	189,000
1960	198,200	148,650
1950	172,531	125,000
1940	136,332	95,000

[1]*In thousands of dollars.*
Source: National Piano Manufacturers Association and industry estimates.



Organs

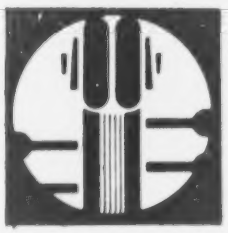
Includes: Domestic production and imports with retail value of $1,000 and up. Exports are not included.

High-end organs were reported as steady sellers in 1987 as dollars dropped 13 percent and units fell 15 percent. The average per-unit value remained stable, compared to the previous year. Industry sources reported a strong market among current owners upgrading to higher-priced units.

Organs

	Units	Dollars[1]
1987	35,200	$121,608
1986	40,000	140,000
1985	49,600	156,300
1984	58,000	174,000
1983	88,000	257,000
1982	101,000	249,000
1981	131,329	323,463
1980	138,724	339,000
1979	175,159	398,487
1978	199,654	478,770
1977	222,400	510,186
1976	217,267	462,779
1975	205,772	395,700
1974	233,845	424,896
1973	202,275	359,836
1972	186,000	314,340
1970	137,500	215,400
1965	143,000	180,600
1960	106,000	141,400
1950	10,000	14,000
1940	NA	NA

[1]*In thousands of dollars.*
Source: National Association of Electronic Organ Manufacturers, U.S. Tariff Commission and industry estimates.



String Instruments

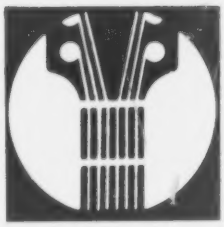
Includes: Imports and domestic production of violins, violas, cellos and basses.

Growing numbers of students in school orchestral programs around the U.S. contributed to the 18 percent unit and 25 percent dollar increases. Domestic production was up 17 percent in units. Imported units rose 18 percent while their total dollar value was up 26 percent due in large part to the devalued U.S. dollar. The average per-unit value of instruments shipped from Europe rose 5 percent (compared to 1986) while the average value of Asian imports increased 10 percent.

String Instruments

	Units	Dollars[1]
1987	102,740	$40,144
1986	86,950	32,029
1985	70,000	26,138
1984	97,500	32,318
1983	93,000	30,000
1982	120,000	38,200
1981	109,500	36,300
1980	94,000	38,000
1979	92,000	39,330
1978	83,500	36,500
1977	75,000	25,200
1976	83,000	25,400
1975	91,225	28,000
1974	63,655	19,466
1973	54,866	15,252
1972	61,565	12,559
1970	75,700	19,720
1965	64,000	13,400
1960	40,600	7,300
1950	NA	NA
1940	NA	NA

[1]*In thousands of dollars.*
Source: U.S. Tariff Commission with adjustment made for domestic production.



Fretted Instruments

Includes: Domestic production and imports. Exports are not included.

Total fretted instrument units increased 11 percent and dollars rose 9 percent over 1986. Industry experts reported strong markets for instruments in all price ranges and a continuing trend toward first-time players. Domestic production showed a 5 percent increase in units and 12 percent rise in dollars. Imports of accoustic and electric guitars, combined, rose 8 percent and 9 percent in units and dollars respectively. Other fretted instruments—including banjos, ukuleles and mandolins—rose 46 percent in units and dropped 25 percent in dollars reflecting an increase in lower-priced imports.

Fretted Instruments

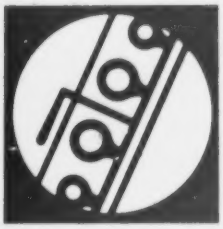
	Units	Dollars[1]
1987	1,247,265	$328,322
1986	1,121,235	302,033
1985	1,056,152	271,636
1984	994,607	236,000
1983	875,106	214,500
1982	1,213,138	252,805
1981[2]	1,332,550	320,417
1980	1,102,041	226,402
1979	1,890,006	301,957
1978	1,872,185	277,464
1977	1,655,572	238,932
1976	1,758,000	245,152
1975	1,540,234	185,036
1974	2,291,212	254,150
1973	2,048,053	208,446
1972	2,541,480	190,914
1970[2]	2,214,686	159,910
1965[2]	1,500,000	140,000
1960	420,000	35,000
1950	220,000	22,000
1940	190,000	10,000

[1]*In thousands of dollars.*
Source: U.S. Tariff Commission and industry estimates.
[2]*These years also include estimates of amplifier and P.A. system sales.*

Fretted Instruments

	1987		1986		1985	
Domestic	**Units**	**Dollars**	**Units**	**Dollars**	**Units**	**Dollars**
Includes Non-electric guitars, Electric guitars and other fretted inst.[1]						
Domestic Total ($ rounded)	123,400	$ 89,279,000	117,470	$ 79,774,000	138,200	$ 92,761,000
Imports						
Non-electric guitars	517,331	$ 79,570,000	492,764	$ 73,554,000	440,253	$ 57,900,000
Electric guitars	452,852	150,642,000	405,965	136,979,000	373,339	112,700,000
Other fretted[2]	153,682	8,831,092	105,036	11,726,000	104,360	8,275,000
Import Total ($ rounded)	1,123,865	$239,043,100	1,003,765	$222,259,000	917,952	$178,875,000
Grand Total ($ rounded)	1,247,265	$328,322,100	1,121,235	$302,033,000	1,056,152	$271,636,000

[1]*Includes domestic production of acoustic and electric guitars and banjos, ukuleles and mandolins.*
[2]*Includes banjos, ukuleles and mandolins.*

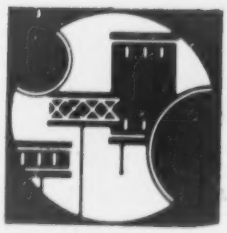


Woodwind Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.

Brass Instruments[1]

Includes: Domestic production as well as imports. Exports are not included.



Percussion

Includes: Domestic production of drums sold in sets, as marching band equipment; mallet instruments, and cymbals. Imports are included and exports are not.

Expanding numbers of students and school music programs, as well as less restricted school music budgets, contributed to healthy increases in both the woodwind and brass-wind categories during 1987.

Woodwind instruments increased 6 percent in units and 8 percent in dollars. Brass-winds were up 5 percent in units and 9 percent in dollars. Alto saxophones and higher-priced flutes were reported as strong sellers.

In both categories, the increase in imports reflected in part larger shipments of higher-priced instruments from Germany, Japan, France and Taiwan.

Band Instruments
A. WOODWINDS (clarinets, saxophones, oboes, flutes, etc.)

	Units	Dollars[1]
1987	346,996	$171,035
1986	326,500	158,000
1985	309,800	141,390
1984	303,000	136,071
1983	326,000	142,055
1982	343,000	142,345
1981	345,000	135,515
1980	321,000	117,000
1979	328,000	114,400
1978	340,000	108,800
1977	337,400	100,498
1976	343,245	96,452
1975	359,000	94,417
1974	402,645	102,674
1973	353,000	85,073
1972	329,207	76,972
1970	304,000	66,150
1965	322,000	61,000
1960	241,000	45,300
1950	122,000	17,000
1940	110,000	6,000

Band Instruments
B. BRASS (trumpets, trombones, French horns, baritones, tubas, sousaphones, etc.)

	Units	Dollars[1]
1987	146,475	$74,411
1986	139,500	69,150
1985	144,600	67,600
1984	143,000	65,544
1983	165,000	73,347
1982	168,000	71,064
1981	201,500	81,205
1980	197,000	74,800
1979	220,000	80,300
1978	229,000	76,715
1977	234,060	72,692
1976	238,600	70,000
1975	253,000	69,322
1974	267,360	71,118
1973	254,000	63,754
1972	219,800	53,666
1970	225,000	51,000
1965	230,000	44,000
1960	153,000	29,700
1950	85,000	13,000
1940	75,000	6,000

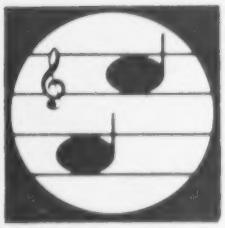
[1] *In thousands of dollars. Source: Industry estimates.*

Continued strong interest in marching bands and growing numbers of students and increased school band program budgets contributed to a 12 percent increase over the previous year. Another factor cited by industry sources was larger than usual price increases due in part to the declining value of the U.S. dollar. Imports, which still represent the majority of this category, were up 20 percent in value, compared to a 50 percent increase the previous year.

Drums

	Units	Dollars[1]
1987	NA	$100,500
1986	NA	90,000
1985	NA	83,000
1984	NA	82,000
1983	NA	78,000
1982	NA	78,475
1981	NA	82,914
1980	NA	69,017
1979	NA	70,426
1978	NA	61,240
1977	NA	56,700
1976	NA	53,000
1975	NA	48,361
1974	NA	57,761
1973	NA	48,134
1972	NA	41,856
1970	NA	32,000
1965	NA	50,000
1960	NA	12,000
1950	NA	NA
1940	NA	NA

[1] *In thousands of dollars.*
Source: Industry estimates.
Unit figures unavailable since drums sold in sets.



Printed Music

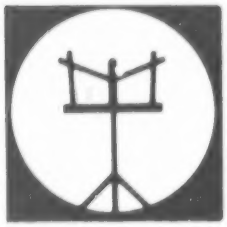
Includes: Domestic publishing of sheet music and self-instruction aids.

According to industry experts, stable school music programs, strong choral programs and a revival of interest in 1950's and 1960's compositions contributed to an 8 percent increase during 1987. (It should be noted that the 1986 total dollar figure has been adjusted downward by $4 million to reflect final results of the annual survey of members of the National Music Publishers, Church Music Publishers and Music Publishers associations not available at MUSIC USA press time last year.)

Printed Music

	Dollars[1]
1987	$308,880
1986	286,000[2]
1985	275,000
1984	266,800
1983	253,000
1982	239,112
1981	236,900
1980	266,220
1979	261,000
1978	241,680
1977	228,000
1976	211,000
1975	197,750
1974	175,000
1973	152,984
1972	129,101
1970	91,500
1967	72,000

[1]In thousands of dollars. 1981–1983 data from a new survey sponsored by National Music Publishers' Assoc., Church Music Publishers' Assoc., and Music Publishers' Assoc. of the U.S.
[2]Figure adjusted downward from $290 million to reflect final data from survey of NMPA, MPA, and CMPA members not available at 1986 press time.



Accessories

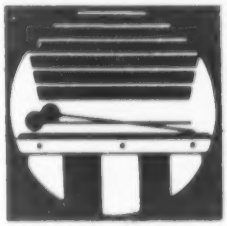
Includes: Estimates for sales of domestically made and imported strings, cases, straps, stands, drum sticks and other percussion accessories, reeds, metronomes, electronic pick-ups, distortion units and other types of electronic devices.

Accessories rose 2 percent over the previous year, with cases, straps and electronics posting the greatest increases at 12, 9 and 7 percent respectively. Guitar strings, the largest dollar segment, were up 2 percent.

Accessories

	Dollars[1]
1987	$230,700
1986	226,000
1985	208,000
1984	200,000
1983	198,000
1982	194,000
1981	194,500[2]
1980	247,000
1979	247,000
1978	236,000
1977	225,000
1976	217,967
1975	198,152
1974	183,474
1973	152,895
1972	132,953
1970	108,400
1967	85,000

[1]In thousands of dollars.
Source: Industry estimates
[2]Nearly $18 million of electronic accessories now included in "P.A. Systems and Components," and $15 million of cymbals moved to "Percussion" category.



Miscellaneous Other Instruments

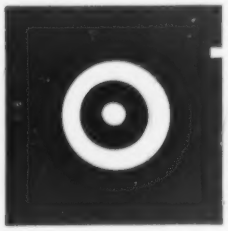
Includes: Imports of drums and other percussion instruments, electronic instruments such as rhythm machines, cymbals, mouth organs, pipe organs, harpsichords, accordions, hand held keyboards, organs valued under $400, and a variety of educational instruments.

Total dollars for this category (including 19 different types of imported instruments) jumped 33 percent in 1987. Leading the increases were electronic instruments, more than doubling, and drums, cymbals and other percussion instruments rising 13 percent. Percussion and electronics, combined, accounted for 67 percent of all dollars in this category, compared to 63 percent in 1986.

Miscellaneous Other Instruments

	Dollars[1]
1987	$301,214
1986	226,954
1985	211,16[illegible]
1984	166,000
1983	151,000
1982	80,000
1981	133,888
1980	124,000
1979	136,600
1978[2]	151,000
1977[2]	91,000
1976	84,258
1975	100,887
1974	106,628
1973	107,072
1972	92,146
1970	78,509
1967	53,800

[1]In thousands of dollars.
Source: U.S. Tariff Commission
[2]Includes $7,000,000 in 1978 and $6,000,000 in 1977 for accordions and concertinas.



Music Software

Includes: Domestic production of sequencing, music notation or sound editing and librarian software products that allow for the creation or composition of music for the purpose of performance, recording, or publishing.

This new category has been added to track the rapidly growing music software market. According to industry experts, the software market is estimated to have doubled in total dollars from 1986 to 1987. Contributing to the increase in 1987 was the introduction of new models of computers and consumers' growing acceptance of the expanded capabilities and greater ease of use of the computer for music sound production and composing.

Music Software

	Dollars[1]
1987	$20,000

[1]*In thousands of dollars.*
Source: Industry estimates.

Portable Keyboards

Includes: Imported keyboards with organ, synthesizer, or even electric piano characteristics that sell from under $100 to $1,000.

With continued large numbers of first-time buyers and expanded distribution outlets for lower-end products (department stores, warehouse clubs, major audio chains, etc.), total units jumped 92 percent while total dollars rose 4 percent over the previous year.

Keyboard units retailing for an average of over $300 (generally sold through MI dealers) remained stable and increased 11 percent in dollars. Under $300 per-unit volume was up nearly 128 percent in units and 7 percent in dollars.

	Units	Value
Under $300:	4,100,000	$287,000,000
Over $300:	698,000	261,750,000
Total:	4,798,000	$548,750,000

Portable Keyboards

	Units	Dollars[1]
1987	4,798,000	$548,750
1986	2,500,000	526,500
1985	1,300,500	253,285
1984	534,000	193,000
1983	282,000	150,000
1982	NA	98,200
1981	NA	53,900[2]
1980	NA	7,586[3]

[1]*In thousands of dollars.*
[2]*Included in Miscellaneous Other Instruments and in Portable Keyboards in 1981.*
[3]*Included in Miscellaneous Other Instruments in 1980.*

Synthesizers

Includes: Domestic production, imports and exports of keyboard type and drum synthesizers.

Digital voice sampling and sequencing as well as growing numbers of consumers with home recording studios were reasons cited by industry experts for the 8 percent unit and 9 percent dollar increases in 1987. Drum synthesizers jumped 15 percent in units and accounted for nearly one-third of this category's total units.

Synthesizers

	Units	Dollars[1]
1987	378,500	$299,900
1986	350,500	275,000
1985	220,000	173,200
1984	134,700	136,000
1983	66,000	80,000
1982	43,000	50,000
1981	34,500	33,000
1980	36,606	32,300
1979	24,172	24,172
1978	24,050	24,050
1977	23,500	23,500
1976	18,000	17,100
1975	15,000	13,500
1974	10,000	11,000
1973[2]	7,000	8,000

[1]*In thousands of dollars.*
[2]*First year for inclusion of this category. Source: Industry estimates.*

Electric Pianos/ Electronic Keyboards

Includes: Domestic production, imports and exports.

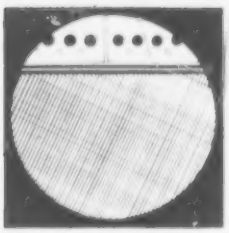
Instruments in this category are designed primarily to make a piano sound and have at least some similarity to piano action.

Portability and advances in sound technology and keyboard "touch" attracted more consumers in 1987, contributing to a 5 percent increase in units and 29 percent rise in value, according to industry experts. A growing trend of school music programs and private teachers utilizing these instruments was also reported. Imports account for between 80 and 90 percent of this category's overall units.

Electric Pianos/ Electronic Keyboards

	Units	Dollars[1]
1987	103,100	$173,208
1986	84,000	134,400
1985	60,000	107,000
1984	50,000	50,000
1983	44,000	44,000
1982	40,000	40,000
1981	37,000	40,700
1980	40,000	40,000
1979	38,737	38,737
1978	25,000	25,500
1977	25,000	24,500
1976	23,300	19,600
1975	22,000	17,600
1974	21,000	14,700
1973	19,000	11,400
1972[2]	15,000	9,000

[1] *In thousands of dollars.*
[2] *First year for inclusion of this category. Source: Industry estimates.*



Sound Reinforcement Equipment

Includes: Domestic production and imports sold through music stores. Exports are not included.

The guitar's continued popularity among both first-time and trade-up buyers was cited as bringing amplifiers up 6 percent in units and 5 percent in dollars.

P.A. systems and components were up 5 percent. Signal processors and mixers were strong sellers and accounted for more than one-third of the total P.A. system and component dollars (up 8 percent over the previous year).

Amplifiers

	Units	Dollars[1]
1987	200,300	$58,250
1986	188,700	55,228
1985	170,000	51,500
1984	166,000	51,500
1983	157,000	50,000
1982	177,000	57,500
1981	177,000	63,860
1980	177,000	62,000
1979	177,000	68,200
1978	177,000	62,000
1977	161,000	48,000
1976	158,000	48,000
1975	154,000	50,000
1974	140,000	55,000
1973	133,980	53,592
1972	110,000	43,245
1971[2]	96,000	35,643

[1] *In thousands of dollars.*
[2] *Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*

P.A. Systems and Components

(mikes, mixers, power amplifiers, speaker systems and components, signal processors)

	Units	Dollars[1]
1987	NA	$215,100
1986	NA	203,900
1985	NA	192,000
1984	NA	181,000
1983	NA	171,000
1982	NA	157,500
1981	NA	175,000[3]
1980	NA	121,000[4]
1979	NA	121,000
1978	NA	108,000
1977	NA	100,000
1976	NA	60,000
1975	71,000	53,000
1974	60,000	45,000
1973	18,900	11,246
1972	18,000	10,318
1971[2]	16,000	9,903

[1] *In thousands of dollars.*
[2] *Previous years' totals are combined with fretted instrument sales. 1971 was the first year breakouts of amplifier and P.A. system sales were available.*
[3] *Includes $18 million of electronic devices previously included in the "Accessories" category.*
[4] *Low estimate according to industry sources.*

EXPORTS UP 47% IN 1987, THE SECOND LARGEST GAIN IN 20 YEARS; IMPORTS RISE 36%

U.S. exports of musical instruments, parts and accessories rose for the second consecutive year, jumping 47% to $165.7 million in 1987, according to the American Music Conference's (AMC) annual interpretive analysis of U.S. Department of Commerce data. Imports were also up in 1987, posting a 36% increase over 1986.

The 1987 export increase was the second largest year-to-year gain reported in the past 20 years. Industry experts attribute the increase to more attractive prices due to the dollar's decline against foreign currencies.

Imports continued a seven-year growth trend, reaching $791 million in 1987. Substantial increases in the electronic instrument categories and strong gains for most traditional instruments contributed to the 36% rise in total value.

Exports

Every category of electronic and traditional exported musical instruments showed gains in 1987, in either units shipped or total dollar value.

The combined value of all exported electronic instruments jumped 61% to nearly $65 million in 1987, accounting for 39% of all U.S. musical instrument exports. Electric guitars led all export categories with a 107% dollar value jump and 67% unit increase. Following closely were synthesizers, electric pianos, up 106% in value and more than doubling in units.

Exported percussion instruments

U.S. IMPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1987 Units	1987 Value	1986 Units	1986 Value	1985 Units	1985 Value	1987 Leading Sources
Pianos	81,535	$141,822,640	70,746	$116,446,770	56,822	$94,333,453	Japan/Korea
Violins, Violas, Cellos, Basses	100,402	7,575,312	87,423	6,027,529	68,419	4,193,493	West Germany/Japan
Guitars, Nonamplified	517,331	19,892,423	492,764	18,388,482	440,253	14,474,467	Korea/Taiwan/Japan
Other Stringed Musical Instruments[1]	153,682	2,207,773	105,036	2,931,464	104,360	2,068,772	Korea/Japan
Strings for Musical Instruments	N/A	4,122,715	N/A	3,472,327	N/A	2,582,214	Austria/United Kingdom
Pipe Organs	104	8,100,449	135	6,915,917	144	6,022,738	Canada
Organs (Except Pipe & Electric)[2]	12,448	10,657,500	65,332	1,850,465	77,830	2,047,275	Italy
Accordions, Concertinas	3,709	1,069,949	7,434	1,509,815	10,130	1,521,769	Italy/West Germany
Mouth Organs[3]	251,107	3,461,789	179,011	3,683,776	220,252	1,945,165	West Germany
Brasswind Musical Instruments[4]	32,028	9,076,579	27,360	7,927,273	26,647	5,257,468	Japan/West Germany
Clarinets	24,585	5,902,151	20,606	4,055,033	26,452	3,672,809	France/Japan
Saxophones	27,999	9,106,394	24,668	7,209,563	18,171	4,916,580	Japan/Taiwan
Other Wind Instruments[5]	978,486	7,048,996	870,319	5,754,275	781,295	4,917,054	Japan
Percussion Musical Instruments[6]	N/A	28,890,837	N/A	25,393,613	N/A	19,470,202	Taiwan/Japan
Electronic Keyboards[7] (Two Keyboards)	176,990	9,550,800	11,560	4,638,806	24,079	11,664,688	Japan/Italy
Electronic Keyboards (One Keyboard)	3,990,715	241,748,738	1,930,390	159,357,868	1,331,042	98,825,359	Japan
Synthesizers (Keyboard Type)	511,435	63,045,361	261,181	61,734,398	176,787	40,752,578	Japan/Korea
Other Electronic Instruments[8]	792,589	57,630,465	107,170	12,861,602	217,347	21,579,862	Japan
Hand Held Electronic Instruments[9]	292,957	5,268,457	40,132	1,208,322	171,052	6,985,478	Hong Kong/Japan/China(M)
Electronic Fretted Instruments	452,852	37,660,460	405,965	34,244,632	373,339	28,176,067	Japan/Korea
Accessories[10]	N/A	36,311,120	N/A	30,584,815	N/A	20,996,434	Japan/Taiwan
Musical Instrument Parts	N/A	73,296,754	N/A	63,048,745	N/A	49,745,334	Japan/Mexico/ West Germany
Harpsichords and Clavichords	7,302	7,576,196	6,876	4,110,855	14,004	4,145,360	Korea/Japan
TOTALS		$791,023,908		$583,356,345		$450,294,619	

Source: U.S. Department of Commerce, Bureau of Census, Foreign Trade Division. [1]Includes banjos, ukuleles and other fretted instruments. [2]1987 figures adjusted by AMC to more accurately reflect imports. Original U.S. Department of Commerce statistics: 58,124 units at $2,357,653. [3]All totals are in dozens. [4]Over $10 in value. [5]Includes flutes, oboes, English horns, etc. [6]Includes cymbals, drums, marimbas, triangles, etc. [7]1987 unit and value figures adjusted by AMC. These figures may still include a variety of different electronic instruments. Original U.S. Department of Commerce statistics: 135,013 units at $17,869,692. [8]Includes any instrument requiring amplification; drum and rhythm machines, etc. [9]Original U.S. Department of Commerce statistics. May contain variety of misclassified instruments. [10]Includes mutes, accessories for drums and cymbals, lyres, music stands, instrument cases, metronomes, pitch pipes, tuning forks and tuning hammers.

topped the traditional instrument categories, more than doubling in total value. Total value of brasswinds reported a 38% increase with units up 37%. Woodwinds jumped 45% in value and 62% in units to 42,000.

Acoustic piano exports showed strong gains, up 45% to nearly $7 million and 63% in units. While electronic organ units were down 18%, total value rose 14%.

Acoustic guitars grew 14% in both units and value.

Other plucked and bowed strings rose 11% in value, but dropped 19% in units.

1987 Imports

The electronic keyboard (with one keyboard) category, with a reported total dollar value of nearly $242 million (up 52% over 1986), led all imports for the third consecutive year. Of the approximately 4 million units imported, 94% were shipped from Japan.

Synthesizer (keyboard type) imports jumped 96% in units with a total value of $63 million. Japanese units rose 28%, with an average per-unit value of $194, compared to the 1986 average of $271.

Electric guitar units, as reported by the U.S. Department of Commerce, were up 12% to nearly 453,000, an all-time high, while total value rose 10%.

Hand-held electronic instruments were up to 293,000 units valued at nearly $5.3 million.

Acoustic pianos, the second largest import category in total value, rose 22% with units up 15%. Vertical pianos (comprising 61% of this category's total) rose 12% in value with an average per-unit value of $1,000 compared to $950 in 1986. Grand piano units were up nearly one-quarter over 1986, with the average per-unit value rising 2% to $2,914.

Acoustic guitars continued an upward swing started in 1986, reaching more than 517,000 units totaling nearly $20 million.

Each category of imported band and orchestra instruments recorded double-digit increases in 1987. As a group, these categories comprise nearly 10% of the total value of all imports. Brasswinds rose 17% in units and 14% in value; clarinets were up 19% in units and 46% in value; saxophones were up 14% in units and 26% in total value; other wind instruments rose 12% in units and 23% in value. Percussion instruments, the largest total dollar category, rose 14% to nearly $29 million.

1987 U.S. EXPORTS OF MUSICAL INSTRUMENTS AND PARTS

CATEGORY	1987 Units	1987 Value	1986 Units	1986 Value	1985 Units	1985 Value	1987 Leading Customers
Pianos	5,642	$6,990,000	3,455	$4,832,603	3,813	$ 4,761,742	Canada
Guitars	14,571	4,417,000	12,764	3,887,866	7,332	2,595,527	Japan
Electric Guitars	26,145	8,686,000	15,663	4,202,302	7,614	1,977,966	United Kingdom/Japan
Other Plucked and Bowed Strings[1]	41,478	4,037,000	51,255	3,623,425	40,945	2,877,401	Japan/Canada
Electronic Organs	3,984	6,332,000	4,878	5,550,991	4,585	6,033,382	Canada/Australia
Synthesizers and Electric Pianos	13,059	6,827,000	4,107	3,316,720	2,330	1,554,789	Holland/Germany
Other Electronic Musical Instruments	N/A	42,655,000	N/A	26,886,507	N/A	18,367,402	United Kingdom/Japan
Brasswinds	42,022	13,549,000	30,703	9,800,039	26,958	8,134,660	Canada/Japan/Germany
Woodwinds	42,075	5,709,000	25,920	3,945,339	34,365	3,822,326	Canada/United Kingdom
Percussion Instruments	N/A	17,387,000	N/A	7,696,202	N/A	6,780,944	Japan/Canada
Organs, Pipe & Reed	124	480,000	88	102,668	87	167,564	United Kingdom/Korea
Piano and Organ Parts	N/A	5,633,000	N/A	4,472,375	N/A	6,560,569	Mexico
Other Parts, Cases and Accessories	N/A	42,291,000	N/A	33,258,117	N/A	28,902,709	Japan/Canada
Other Musical Instruments[2]	38,279	744,000	22,975	938,329	5,822	337,879	Canada/Korea
TOTALS		$165,737,000		$112,513,483		$92,874,860	

[1]Includes harps, clavichords, mandolins. [2]Includes mouth organs, accordions.

1987 NAMM RETAILER SURVEY

During 1987, overall retail sales of musical instruments, sheet music and accessories increased 7.5 percent compared to 1986, as reported by music retailers around the U.S. who participated in the National Association of Music Merchants' (NAMM) ongoing survey. Data is analyzed monthly by Industry Insights, Inc., of Columbus, Ohio.

Piano sales during 1987 were up nearly 4 percent and organs were down by 2.5 percent.

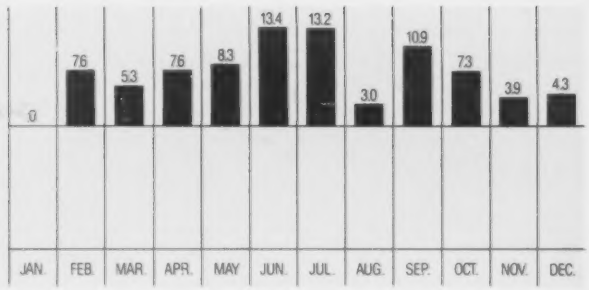
Band and orchestra instruments rose approximately 11.5 percent and percussion instruments by nearly 3 percent.

Fretted instrument sales rose 7.7 percent, sound reinforcement equipment by slightly more than 3 percent, and electronic keyboards surged ahead 38 percent. Instrument amplifiers (guitar, bass and keyboards) increased 2.5 percent and signal processing and effects devices posted a 16 percent gain over the previous year.

Sheet music sales were up almost 6 percent and accessories by 11 percent.

Recording equipment sales (not shown by a separate chart) were down 15.5 percent during 1987.

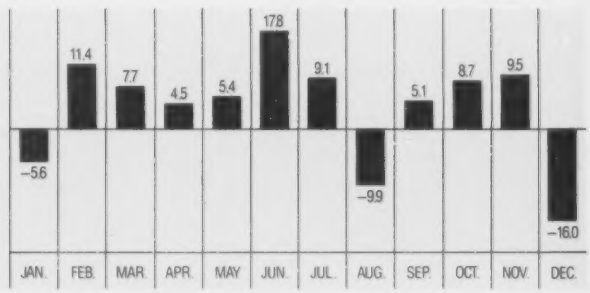
Total Net Sales



In Percent = Change from same month of prior year

1987 Calendar Year: + 7.5%

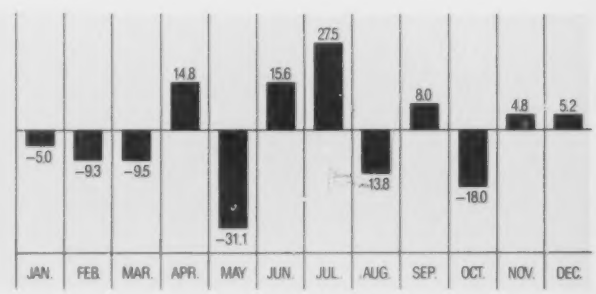
Pianos



In Percent = Change from Same month of prior year

1987 Calendar Year: +3.9%

Organs



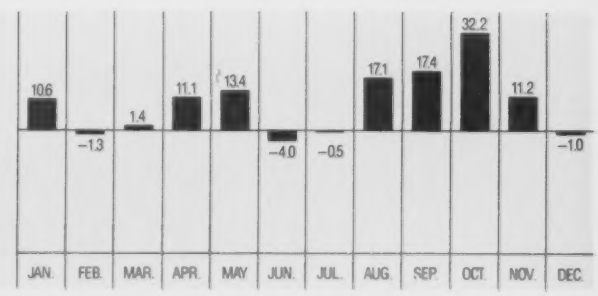
In Percent = Change from same month of prior year

1987 Calendar Year: −2.5%

How to Read The Charts: On each of the following charts, 1987 total net sales in each product category are shown as the percentage of change from the same month of the prior year. It should be noted that dollar information has not been adjusted for inflation.

Further information about this music retailer survey is available from The National Association of Music Merchants, 5140 Avenida Encinas, Carlsbad, California 92008.

Percussion



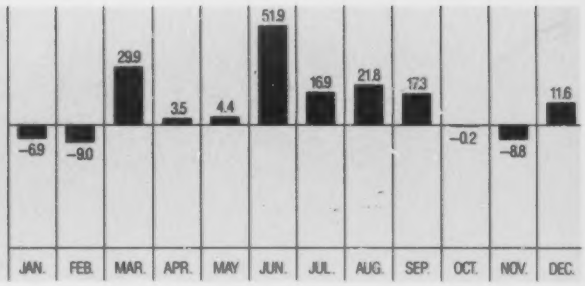
In Percent = Change from same month of prior year

1987 Calendar Year: +2.9%

Band and Orchestra Instruments

In Percent = Change from same month of prior year

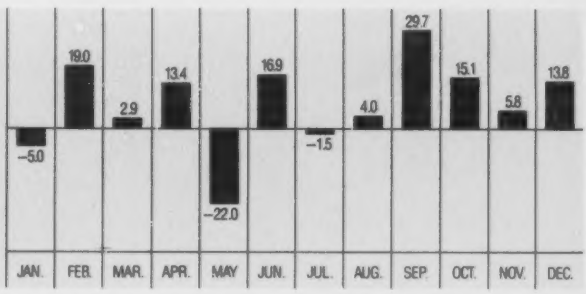
1987 Calendar Year: +11.6%



Fretted Instruments

In Percent = Change from same month of prior year

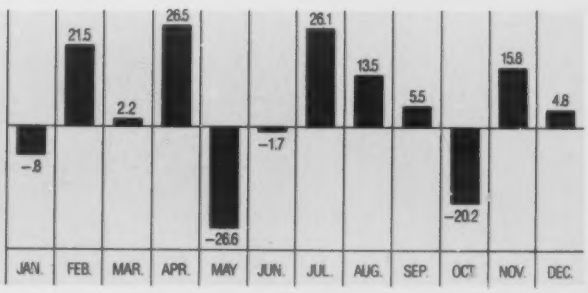
1987 Calendar Year: +7.7%



Sound Reinforcement Equipment

In Percent = Change from same month of prior year

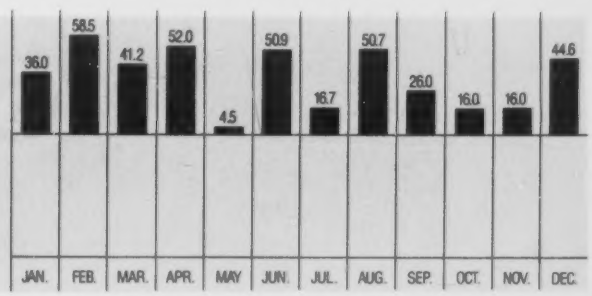
1987 Calendar Year: + 3.3%



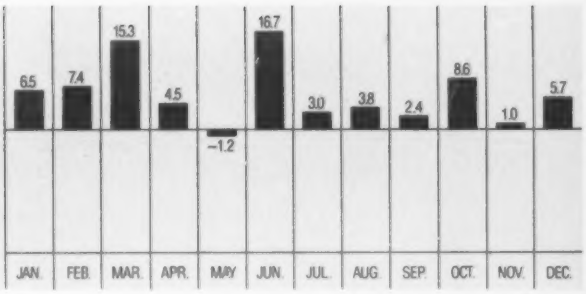
Electronic Keyboards

In Percent = Change from Same month of prior year

1987 Calendar Year: +38.3%



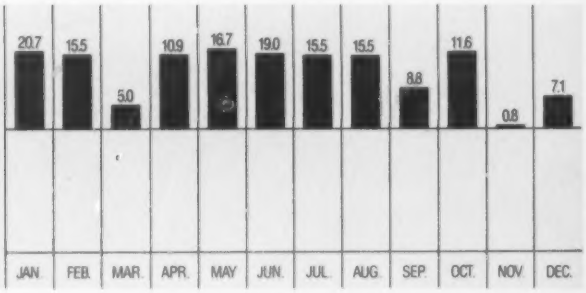
Sheet Music



In Percent = Change from same month of prior year

1987 Calendar Year: +5.9%

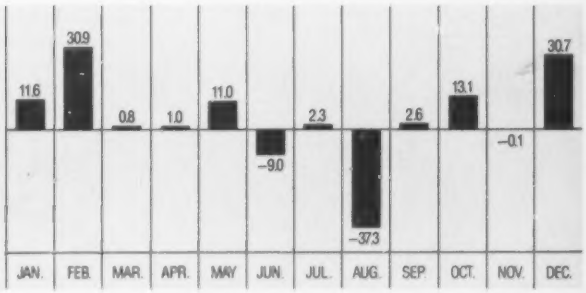
Accessories



In Percent = Change from same month of prior year

1987 Calendar Year: +11.1%

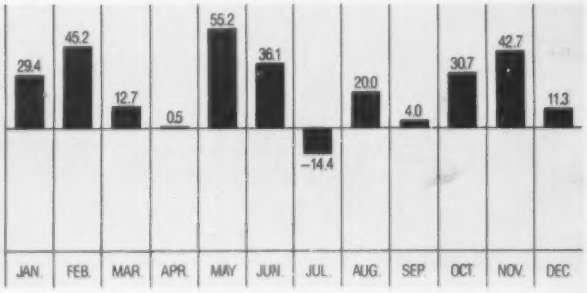
Instrument Amplifiers



In Percent = Change from same month of prior year

1987 Calendar Year: +2.5%

Signal Processing and Effects Devices



In Percent = Change from same month of prior year

1987 Calendar Year: +16.0%

Consumer Profiles

NEW AMC SURVEYS PROVIDE INSIGHT INTO MUSIC SOFTWARE AND HOME RECORDING EQUIPMENT CONSUMERS: THEIR NEEDS, WHAT THEY WANT FROM STORES AND PRODUCTS THEY PURCHASE, USE

Music software users and purchasers are young, dynamic music-makers who know what they want, not just from the stores they patronize but the products themselves. And, while they represent the "hi-tech" area of music-making, traditional training and playing of traditional instruments played a large role in their musical development, according to a new American Music Conference consumer profile survey.

Longtime Musicians

Demographically, software purchasers/users responding to the survey tended to be single males, young (under age 35), well-educated (college graduates or higher), and have comfortable incomes, compared to the U.S. median income.

In terms of musical background, they tended to be longtime musicians; 63 percent first got involved with music before age 13 and one-quarter before age seven. And, the majority had played in a band, orchestra or other music group during their school years and were professional or semi-professional musicians. However, a fairly large minority (33 percent) were purely amateurs, a proportion likely to grow as the software industry expands.

How did these music software users first learn to play musical instruments? Certainly, among survey participants, *both* formal musical training *and* informal participation appear to have played important roles in their musical backgrounds. Their responses underlined the complementary and interdependent nature of formal and informal music training; 85 percent learned by self-instruction and nearly the same number took private music lessons. More than half learned via casual participation in bands or combos and an equal proportion took part in organized school music programs.

Survey respondents own a wide variety of musical instruments and equipment, especially those most closely associated with the use of computers and software; smaller numbers own a variety of other instruments, as well.

MOST FREQUENT USES OF MUSIC SOFTWARE

Sequencing	86%
Composing	79
Recording	63
Making keyboard sound like other instruments	60
Sound librarian	53

INSTRUMENTS SOFTWARE CONSUMERS OWN, LEARNED TO PLAY ON

	Own	Learned To Play
Synthesizer	93%	16%
Guitar	60	37
Piano	56	58
Woodwind	22	11
Brass	17	12
Organ	12	8
Stringed Instrument	8	5

While software purchasers are most likely to currently own synthesizers and other electronic items, they learned to play primarily on traditional instruments, again supporting that the worlds of traditional and electronic music are inextricably linked.

Experienced Purchasers

Most respondents were experienced, active software purchasers. Two-thirds said they were not first-time buyers and among the 66 percent who were repeat purchasers, three-quarters made more than one software purchase in the past year. Further, they reported currently using an average of three different music software packages.

Flexibility and ease of use were the attributes most desired from the music software itself. Detailed package information and price were considered important by some respondents, but brand name appeared to be relatively unimportant.

About half the respondents said they would like the music software they currently use to do something it doesn't now, such as interface with other software, print better graphics and print-out sheet music and offer increased memory capacity, simplified instruction manuals and more editing/patching capabilities.

Choosing the Store

From the stores they shop, respondents, in general, want first and foremost, knowledgeable salespeople to help with purchases and the ability to see software demonstrated in-store. Secondarily, they want wide product selections, informative in-store materials and, especially for non-professionals, products for different experience levels. Relatively unimportant was that stores be self-service, offer computer hardware, and be in convenient locations.

Why did they choose the particular stores in which they last purchased music software? Again, knowledgeable service was the most often cited reason. But other factors surfaced as well, such as availability of software and past experience with a store.

When respondents were asked in what type of store they last purchased music software, by far the most frequent response was a music store. Direct mail and computer music stores ran a distant second, followed by computer software stores. Only a few respondents made their last software purchase in other types of stores.

According to survey participants, their software purchases are planned, rather than impulse, buys; 86 percent planned the purchase and 81 percent knew the name of the software package they wanted before shopping.

WHAT SOFTWARE CONSUMERS WANT

From The Store	
Knowledgeable salespeople	65%
In-store demonstration	57
Wide software selection	36
Informative point-of-purchase materials	31
Software for all experience levels	16
Self-service	6
Ability to buy computer equipment	6
Close to home	4
Close to work	3

From The Software	
Can do many things	46%
Easy to understand/use	41
Detailed package description	34
Low prices	23
Well-known brand name	7

HOME RECORDING, SOFTWARE CONSUMER DEMOGRAPHICS

	Home Recording Consumers	Music Software Consumers
Less than 35 years old	69%	60%
College graduate or more	47	58
Single	58	58
Male	93	93
$40,000+ income	46	51

How does the music retailer reach these purchasers? AMC's survey suggests, first of all, that advertising can be an effective tool; three-quarters of the respondents had seen advertising for a piece of software prior to purchase. Finally, general editorial, as well as advertising in magazines, is another way to communicate with software customers.

THE HOME RECORDING EQUIPMENT CONSUMER

Overall, the profile of home recording equipment consumers tended to be similar to that of the music software user; they tended to be young, single men who are well-educated and somewhat upscale in income. The majority were professional or semi-professional musicians who got involved in music-making at a fairly early age and whose backgrounds include both formal and informal music training. While they own both electronic and traditional instruments, home recording equipment consumers responding to the survey were most likely to have learned to play on traditional acoustic instruments.

A few differences should be noted, however.

Home recording equipment consumers, compared to music software users, are a bit younger (69 percent under age 35 versus 60 percent under age 35) and a bit less likely to be college educated.

Home recording consumers are also more likely to report informal music training and less likely to say they took part in school music programs.

While the majority of music software consumers said they first learned to play on the piano, guitar was the first instrument most frequently mentioned by home recording equipment buyers. And, home recording equipment buyers are less likely to currently own pianos and synthesizers and more likely to own guitars.

The home recording equipment purchasers in the AMC survey sample tended not to be new to this category. Only 14 percent said they were first-time purchasers. One-third said they were adding on to existing equipment and 30 percent were both trading up and adding to existing systems. Two-thirds of the survey respondents made their first home recording equipment purchase three or more years ago and 43 percent made their first purchase five or more years ago.

Ownership and Use

Respondents to the home recording equipment survey were most likely to own stereo cassette decks, signal processing equipment, and monitor speakers. About half own amplifers and mixing boards, and 40 percent own combination multi-track cassette recorders/mixing boards. Reel-to-reel tape recorders are owned by relatively small numbers of respondents.

Most commonly purchased by respondents in the past year were signal processing equipment and combination multi-track cassette recorder/mixing boards.

Respondents are most likely to use their home recording equipment to help compose or record their own compositions and for personal enjoyment. Other common uses include creating arrangements to play along with, recording the compositions of others, and recording their own professional performances. Relatively less common was making back-up tapes for use in performing, recording others' performances, video applications and teaching.

What Consumers Want From The Stores

Home recording equipment buyers, like software purchasers, most frequently want knowledgeable salespeople and in-store product demonstrations to help in their buying decisions. Price appears to be a relatively more important consideration in this category than for music software: half the respondents rated low store price as an extremely important consideration.

Informative in-store materials and wide brand selection was also rated extremely important by some respondents. Relatively unimportant was the availability of other music equipment or computers in the same store and convenient location.

The importance of price was underlined by survey participants when asked their reasons for selecting the store at which they last purchased home recording equipment. Price, mentioned by nearly half of the respondents, was the most frequently given reason for choosing a particular outlet. Good service (positive past experiences and knowledgeable assistance) was the second most frequently given reason, followed by availability (the simple fact the store carried home recording equipment).

Home recording equipment appears to be purchased primarily at music stores or specialized professional audio equipment dealers. Fifty-five percent of respondents said they made their last home recording equipment purchase at a music store, 31 percent at a professional audio equipment store. Less than five percent gave any other outlet type as the source of last purchase.

INSTRUMENTS HOME RECORDING CONSUMERS OWN, LEARNED TO PLAY ON

	Own	Learned To Play
Drum Machine	70%	7%
Electronic Drums	42	2
Acoustic Drums	22	15
Synthesizer	73	12
Electric Guitar	61	34
Acoustic Guitar	60	38
Acoustic Piano	34	46
Electric Piano	25	4
Portable Keyboard	31	4
Woodwind Instrument	18	9
String Instrument	16	7
Brass Instrument	15	8
Organ	12	6
Other	30	6

HOME RECORDING CONSUMERS' EQUIPMENT OWNERSHIP, PURCHASE

	Own	Bought Past Year
Stereo cassette deck	69%	33%
Signal processing equipment	65	56
Monitor speakers	65	33
Monitor amplifiers	53	20
Mixing board	52	28
Combo multi-track cassette tape recorder/mixing board	44	42
Reel-to-reel tape recorder	49	24

What Consumers Want From The Equipment

Audio quality was by far the most important product attribute for home recording equipment buyers. Almost three-quarters said it was extremely important that home recording equipment "give the best audio quality." MIDI

WHAT HOME RECORDING EQUIPMENT CONSUMERS WANT

From The Store

Knowledgeable salespeople	65%
See equipment demonstrated	58
Low prices	51
Informative in-store materials	39
Wide brand selection	24
Can buy other music equipment	13
Can buy computer equipment	11
Close to work/home	5

From The Equipment

Gives best audio quality	72%
Has MIDI capability	44
Low price	30
Easy to understand/use	27
Software available	27
Variety of features	27
Well-known brand name	12

WHERE SOFTWARE WAS PURCHASED

Music store	49%
Direct mail	17
Computer music store	14
Computer software store	11
Computer hardware store	3
By catalog	2
Individual programmer	1
Trade show	1
All others	2

Home recording consumers reported using a variety of information sources in making their purchase decisions. The most frequently mentioned were word-of-mouth, advertising, store displays and past experience. While this research suggest aknowledgeable salespeople and in-store demonstrations are important considerations when shopping for home recording equipment, only a few respondents mentioned these as sources of information for their last purchase.

capability ranked second, with 44 percent of respondents rating this attribute extremely important. Low price, ease of use, software availability, and variety of features were also rated extremely important by some. Brand name, however, was viewed as relatively unimportant by these respondents.

Two-thirds of respondents said they knew what brand of equipment they wanted before shopping and nearly 60 percent knew the model they wanted. Thus, home recording equipment purchase preferences appear not to be predetermined to the same extent as music software purchases where 81 percent of the respondents said they knew the software package they wanted before shopping.

Music retail stores participating in the Music Software Consumer Survey were: G. Leuenberger & Co., San Francisco; Sam Ash Music, New York; Knute-Koupee Music, Minneapolis; Pi Keyboards and Audio, Cleveland; West L.A. Music, Los Angeles; Daddy's Junky Music Stores, Salem, NH; Computers & Music, Daly City, CA.

Participating in the Home Recording Equipment Consumer Survey were: Leo's Audio and Music Technologies, Oakland, CA; Gand Music & Sound, Chicago; West L.A. Music, Los Angeles; Sam Ash Music, New York, and Daddy's Junky Music, Salem, NH.

Survey Format: Using a combination of mail questionnaires and telephone callbacks, music software and home recording equipment customers of music retailers across the country were surveyed. All respondents had purchased music software or home recording equipment in the pat year, with the vast majority making these purchases for themselves, rather than as purchase agents or gift-givers for others.

AMC SURVEY OF YOUNG ADULTS UNDERLINES IMPORTANCE OF PARENTAL SUPPORT, EARLY AND VARIED INVOLVEMENT IN DEVELOPING LIFELONG COMMITMENT TO MUSIC-MAKING

The importance of parental support and early and varied childhood involvement in developing a lifelong commitment to participation in instrumental music-making has been underlined by the American Music Conference's new Young Adult Attitudes Survey.

These insights, along with many others, into the musical attitudes, backgrounds, and practices of young adult players and non-players, were revealed by the new survey underwritten by the National Association of Music Merchants (NAMM).

According to the survey, adults age 18 to 35 who currently play musical instruments are more likely to have started studying or playing at a young age; have families who are also involved in music, and have been exposed to many types of musical instruments and methods of learning.

Demographically, young adults responding to the survey who currently play musical instruments (compared to those who used to or never played) tend to be male, between ages 18 and 25, college-educated, and working in professional or technical occupations.

THE LEARNING EXPERIENCE

	Past Players	Current Players
Original Motivation		
Parents got me started	32%	42%
Became interested on my own	50	49
When First Learned to Play		
Before age 11	63%	72%
12–14	28	15
After age 15	9	13
Ways Learned to Play		
Private lessons	48%	68%
Self-taught	36	68
Taught by parent/family member	16	27
Friend taught me	15	26
School lessons	51	47
School band/orchestra	44	46
Informally only	10	10

Positive Perceptions Of Music-Making

Overall, the survey respondents' perceptions of music and music participation tend to be positive.

As would be expected, those who currently play an instrument are more likely than others to agree with positive statements about music. However, all respondents, whether or not they play, view music-making as a healthy, worthwhile activity. To varying degrees, they all agree that playing an instrument is something a person will always be glad he or she learned to do; that music-making brings families together, and that all children should be exposed to playing an instrument. Survey respondents also believe that communities should provide financial support for music education programs in their schools.

The healthy, creative aspects of playing or learning to play musical instruments were reasons cited most often by survey respondents in all three groups. Their reasons tend to focus on the internal or individual, rather than social, benefits of instrumental music. The top four reasons for playing (cited by each of the three groups surveyed) include providing a sense of personal accomplishment, a way of relaxing, a good hobby, and a way to help relieve stress.

The Learning Experience

Survey results also suggest that three factors influence lifelong commitment to instrumental music: parental support, early childhood involvement and participation in a variety of musical activities.

Current players are more likely than past players to report that their first involvement with music was at an early age and through private or informal lessons, rather than school music lessons or band.

In addition to parental encouragement, participation in instrumental music by parents and other family members may also influence adult musical involvement. In 69 percent of the households or families of survey respondents who currently play instruments, someone else also plays. This compares to 30 percent and 38 percent respectively of households of those who have never or used to play.

Further, young adults who currently play musical instruments are much more likely than those in the other two groups to have parents or siblings

INSTRUMENTS EVER LEARNED TO PLAY

	Past Players	Current Players
Portable Keyboard	10%	33%
Synthesizer	2	14
Electric Piano	4	24
Acoustic Piano	37	60
Home Organ	20	34
Acoustic Guitar	24	42
Electric Guitar	7	19
Other Stringed	12	23
Electronic Drums/Rhythm Machine	0	8
Acoustic Drums	8	14
Other Percussion	6	12
Brass	20	19
Woodwind	31	34

REASONS TO START PLAYING AGAIN

	Non-Players	Past Players
If I had more time	48%	55%
If instruments weren't so expensive	30	27
If I could sound good quickly	21	24
If lessons weren't so expensive	26	19

who play. They also are more likely to marry other players and to have children who play.

Survey respondents who currently play are most likely to play a keyboard instrument, whether or not it is the first instrument on which they learned.

Young adults who used to play are more likely to cite lack of time as a reason for no longer playing. Non-players are more likely than past players to say less expensive instruments and music lessons could motivate them to learn.

Survey Format: *Using a postcard-type screener, a balanced national sample of 3,800 young adults age 18 to 35, were separated into three groups: those who currently play a musical instrument, those who used to play but no longer do, and those who have never played an instrument. Three different survey questionnaires were then mailed to the 1,935 respondents in the three categories who agreed to fill out a longer questionnaire.*

Editor's Note: *The American Music Conference wishes to acknowledge and thank the National Association of Music Merchants (NAMM) for its generous underwriting of this year's three new research studies.*

The main objectives of the music software and home recording equipment consumer surveys were to develop profiles of the "typical" purchaser/user of these music-making related products. The surveys' results also will help all members of the music community better understand these "hi-tech" musicians in terms of demographics; involvement with music and these products and how they use them; activities in which they engage, and their media habits. To flesh out these profiles, AMC's surveys also gathered information about consumers' needs and wants: what they look for in the products, why they shop where they do, the types of in-store salespeople and displays that meet their needs, and their service desires.

The Young Adult Attitudes Toward Music-Making survey focused on the attitudes toward and participation in both electronic and traditional music-making by adults age 18 to 35 in order to have a better understanding of this age group and its influence on the future of music-making in America.

For information on how to order complete written reports on this year's three new AMC surveys contact: American Music Conference, 303 E. Wacker Dr., Suite 1214, Chicago, Ill 60601 or call (312) 856-8820.

DIRCTORY OF MUSIC-RELATED ASSOCIATIONS AND ORGANIZATIONS

(Trade, Educator, Religious, Fraternal, Service, and Other)

Please Note: For easier reference, directory listings under each category are alphabetical by key words, i.e., piano, singing, flute, etc.

TRADE

AMERICAN FEDERATION OF MUSICIANS
1501 Broadway Suite 600
New York, NY 10036
(212) 869-1330
Represents professional recording, television, movie, performance, and other musicians.

NATIONAL ASSOCIATION OF BAND INSTRUMENT MANUFACTURERS
℅ G. Leblanc Co.
7019 30th Ave.
Kenosha, WI 53141
(414) 658-1644
Promotes growth of instrumental music worldwide.

NATIONAL ASSOCIATION OF PROFESSIONAL BAND INSTRUMENT REPAIR TECHNICIANS
8 Ardith Dr.
Normal, IL 61761
(309) 453-4257
Provides forum for exchange of ideas and implements code of professional ethics.

RETAIL SHEET MUSIC DEALERS ASSOCIATION
℅ Paige's Music
5252 E. 65th St.
Indianapolis, IN 46220
(317) 842-2101
Promotes sheet music dealer/publisher relations; encourages music education, and provides common ground for exchange of ideas.

NATIONAL ASSOCIATION OF SCHOOL MUSIC DEALERS
317 E. Walnut
Springfield, MO 65806
Services the musical needs of schools at all levels.

MUSIC ACHIEVEMENT COUNCIL
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
A joint council of the National Association of Music Merchants and National Association of Band Instrument Manufacturers dedicated to the retention of students in school band and orchestra programs.

MUSIC DISTRIBUTORS ASSOCIATION
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory wholesalers, importers, or manufacturers.

NATIONAL ASSOCIATION OF ELECTRONIC KEYBOARD MANUFACTURERS
℅ Lowell Simpson
Baldwin Piano and Organ Co.
422 Wards Corner Rd.
Loveland, OH 45140-8390
(513) 576-4500
Association for U.S. electronic keyboard manufacturers.

CREATIVE AUDIO AND MUSIC ELECTRONICS ORGANIZATION
17 Clara Rd.
Framingham, MA 01701
(617) 877-6459
Represents professional audio and music electronics manufacturers and distributors.

GUITAR & ACCESSORIES MUSIC MARKETING ASSOCIATION
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for fretted instrument and/or related accessory manufacturers and distributers.

NATIONAL ASSOCIATION OF MUSIC IMPORTERS & EXPORTERS
136 W. 21st St.
New York, NY 10011
(212) 924-9175
Association for musical instrument and accessory importers and exporters; publishes import/export statistics, trade show and tariff schedules, and newsletters reporting worldwide government activities affecting international trade.

GUILD OF AMERICAN LUTHIERS
8222 S. Park Ave.
Tacoma, WA 98408
(206) 472-7853
Information exchange network for stringed instrument builders and repairers.

NATIONAL ASSOCIATION OF MUSIC MERCHANTS
5140 Avenida Encinas
Carlsbad, CA 92008
(619) 438-8001
Represents retailers, manufacturers and distributors of musical instruments, professional audio equipment and related music accessories. Also provides a variety of educational and support services, including management of two annual trade exhibitions.

INTERNATIONAL MIDI ASSOCIATION
12439 Magnolia Blvd., #104
North Hollywood, CA 91607
(818) 505-8964
International MIDI (Musical Instrument Digital Interface) information network and official distributor of the MIDI 1.0 Detailed Specification.

INTERNATIONAL ASSOCIATION OF PIANO BUILDERS & TECHNICIANS
9140 Ward Parkway
Kansas City, MO 64114
(816) 444-3500
International association for piano technicians.

PIANO MANUFACTURERS ASSOCIATION INTERNATIONAL
4020 McEwen
Suite 105
Dallas, TX 75244-5019
(214) 233-9107
Association representing the acoustic piano industry.

PIANO TECHNICIANS GUILD, INC.
9140 Ward Parkway
Kansas City, MO 64114
(816) 444-3500
Association for technicians specializing in tuning, maintenance, repair and rebuilding of fine pianos. Provides examinations for Registered-Tuner-Technician (RTT).

NATIONAL MUSIC PUBLISHERS ASSOCIATION
205 E. 42nd St.
New York, NY 10017
(212) 370-5330
Association representing the music publishing industry.

EDUCATOR/SCHOOLS

ASSOCIATION OF COLLEGE, UNIVERSITY AND COMMUNITY ARTS ADMINISTRATORS, INC.
6225 University Ave.
Madison, WI 53701
(608) 233-7400
Acts as liaison between performing artists and artist management.

COLLEGE BAND DIRECTORS NATIONAL ASSOCIATION
Box 8028
University of Texas
Austin, TX 78713
(512) 471-5883
Supports and promotes growth of member musicians, educators, conductors and administrators.

AMERICAN SCHOOL BAND DIRECTORS ASSOCIATION
PO. Box 146
Otsego, MI 48054
(616) 694-2092
Promotes the advancement and improvement of elementary and secondary school instrumental music instruction.

AMERICAN COLLEGE OF MUSICIANS
808 Rio Grande
Austin, TX 78767
(512) 478-5775
Promotes music education with established standardized curriculum for piano teachers and students.

COLLEGE MUSIC SOCIETY
1444 15th St.
Boulder, CO 80302
(303) 449-1611
Organization for college music teachers which gathers and disseminates information and ideas on music in higher education.

NATIONAL ASSOCIATION OF COLLEGE WIND & PERCUSSION INSTRUCTORS
Division of Fine Arts
Northeast Missouri State University
Kirksville, MO 63501
Provides communications forum for college, university and conservatory wind and percussion teachers.

MUSIC EDUCATORS NATIONAL CONFERENCE
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Dedicated to helping individual music educators cope with complexities of changing responsibilities.

MUSIC INDUSTRY CONFERENCE
℅ MENC
1902 Association Dr.
Reston, VA 22091
(703) 860-4000
Auxiliary organization of the Music Educators National Conference which serves the mutual interests of the industry and educators through exchange of ideas, development of code of ethics, and maintenance of the highest level of business procedures at conventions and in advertising and all relations with the public.

ORGANIZATION OF AMERICAN KODALY EDUCATORS
Music Department, Nicholls State University
Box 2017
Thibodaux, LA 70310
(504) 448-4602
Organization for public and private teachers, students, administrators and others who support the Kodaly teaching method.

NATIONAL GUILD OF COMMUNITY MUSIC SCHOOLS
40 N. Van Brunt St., Room 9
Englewood, NJ 07631
(201) 871-3337
Association of nonprofit, nondegree community schools of the arts that offer instruction to people of all ages and ability.

NATIONAL SCHOOL ORCHESTRA ASSOCIATION
345 Maxwell Dr.
Pittsburgh, PA 15236
(412) 882-6696
Supports elementary, junior and senior high school and university instrumental music teachers dedicated to development of school orchestra programs.

COUNCIL FOR RESEARCH IN MUSIC EDUCATION
1205 W. California
Urbana, IL 61801
(217) 333-1027
Organization for scholars and institutions interested in advancing the cause of research in music teaching and learning.

NATIONAL ASSOCIATION OF SCHOOLS OF MUSIC
11250 Roger Bacon Dr., Suite 21
Reston, VA 22090
(703) 437-0700
Provides accreditation, statistical services, policy analysis and administrative development for programs preparing professional musicians, teachers and music services personnel.

NATIONAL COUNCIL OF STATE SUPERVISORS OF MUSIC
Virginia Department of Education, Box 6Q
Richmond, VA 23216
(804) 225-2059
Advisory body to the National Association of Music Educators' National Executive Board with membership open to anyone responsible for music in a state or territory department of education and a member of MENC. Goal is to develop and strengthen music education in the U.S. and its territories.

AMERICAN STRING TEACHERS ASSOCIATION
UGA Station Box 2066
Athens, GA 30612-0066
(404) 542-2741
Promotes and encourages professional and amateur string (including guitar and harp) and orchestra study, performance, teacher education, research and pedagogy.

SUZUKI ASSOCIATION OF THE AMERICAS
PO. Box 354
Muscatine, IA 52761-0354
(319) 263-3071
Organization of teachers, parents and educators interested in and dedicated to advancement of the Suzuki Method in the western hemisphere.

MUSIC TEACHERS NATIONAL ASSOCIATION
441 Vine St., Suite 2113
Cincinnati, OH 45202-2982
(513) 421-1420
Organization serving music teachers in studios, conservatories, music schools, public and private schools and institutions of higher learning.

WOMEN BAND DIRECTORS NATIONAL ASSOCIATION
344 Overlook Dr.
West Lafayette, IN 47906
(317) 463-1738
Provides encouragement for young women entering the instrumental music field and develops comprehensive music and education programs beneficial to women band directors and their students.

RELIGIOUS

NATIONAL CATHOLIC BANDMASTERS ASSOCIATION
Box 1023
Notre Dame, IN 46556
(219) 239-7136
Organization representing Catholic school instrumental music teachers which promotes qualitative and quantitative growth of Catholic school band programs, with special emphasis on solutions to the unique and specific concerns encountered in parochial schools.

CHRISTIAN INSTRUMENTAL DIRECTORS ASSOCIATION
P.O. Box 907
Pentwater, MI 49449
(616) 869-5085
Designed to meet the needs of private, church-related school band and/or orchestra directors and church music directors interested in using instruments in worship.

STANDING COMMISSION ON CHURCH MUSIC OF THE EPISCOPAL CHURCH
800 Abbott Rd.
East Lansing, MI 48823
(511) 351-7160
Undertakes research and development of musical resources (e.g. hymnals), guidelines and educational materials for Episcopalian liturgical music.

PRESBYTERIAN ASSOCIATION OF MUSICIANS
1000 E. Morehead St.
Charlotte, NC 28204
(No Telephone)
Association which cooperates with Presbyterian Church (USA) agencies and offers assistance in worship, music and the arts.

UNITARIAN UNIVERSALIST MUSICIANS' NETWORK
536 Linton St.
Cincinnati, OH 45219
(513) 729-4183
Association of professional church musicians and supporters united to enhance the quality of U.U. music and musicians.

FRATERNAL

PHI BETA MU INTERNATIONAL BANDMASTERS FRATERNITY
1111 Belaya St.
Houston, TX 77090
(713) 586-1111
Honors outstanding band directors and provides clinic services for instrumental music.

PI KAPPA LAMBDA
School of Music
Northwestern University
Evanston, IL 60208
(312) 491-5737
Recognizes and encourages highest level of musical achievement and academic scholarship.

RESEARCH AND PROMOTION

ACCORDION FEDERATION OF NORTH AMERICA, INC.
11438 Elmcrest St.
El Monte, CA 91732
(213) 686-1769
Music school operators and teachers dedicated to advancing the accordion in all areas.

AMERICAN ACCORDION MUSICOLOGICAL SOCIETY
334 S. Broadway
Pitman, NJ 08071
(609) 589-8308
Research and library facility (for composers, performers, music educators) of information relating to all aspects of the accordion as a serious concert instrument.

NATIONAL BAND ASSOCIATION
℅ James Croft
School of Music
Florida State University
Tallahassee, FL 32306
(904) 644-3507
Dedicated to promoting bands and the achievement of excellence in bands and band music.

INTERNATIONAL SOCIETY OF BASSISTS
School of Music
Northwestern University
Evanston, IL 60208
(312) 491-4764
Stimulates public interest, improves performance standards and provides an organization for musicians specializing in double bass instruction, study, performance, manufacture, repair and research.

BLACK MUSIC ASSOCIATION
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